Fondo Multilateral de Inversiones
Miembro del Grupo BID

REPORTE DE ESTADO DEL PROYECTO

ENERO 2015 - JUNIO 2015

SECCIÓN 1: SÍNTESIS DEL PROYECTO

NOMBRE DEL PROYECTO: Tour Operadores plan para el desarrollo de turismo sostenible

Nro. Proyecto: RG-M1213 - Proyecto No.: ATN/ME-13410-RG

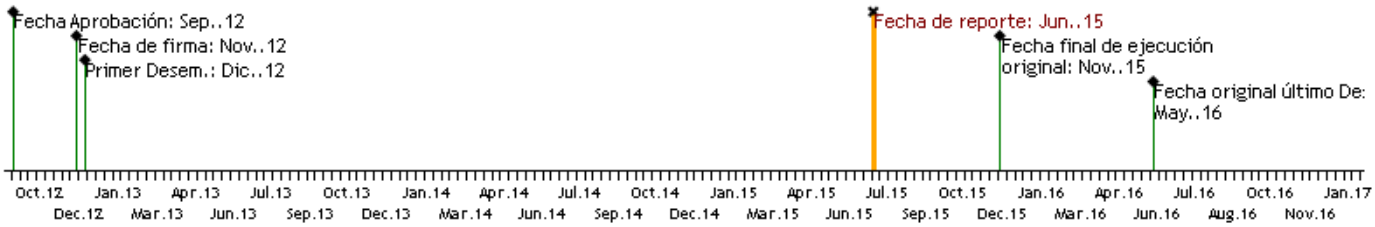
Propósito: Create a model that will optimize market access and efficiency in the tourism value chain by connecting MSE with a large adventure tour operator from the point of product development, providing them access to a ready market, capabilities and the tools to serve the market demand.

País Administrador	País Beneficiario
COSTA RICA	BOLIVIA, EL SALVADOR, GUATEMALA, NICARAGUA, PERÚ

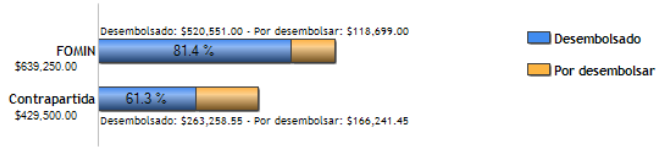
Agencia Ejecutora: G ADVENTURES, INC.

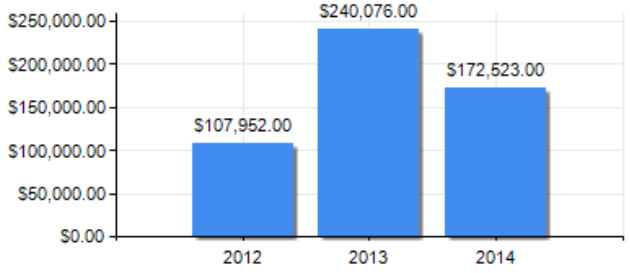
Líder equipo de diseño: BETSY MURRAY
Líder equipo de supervisión: BETSY MURRAY

CICLO DEL PROYECTO

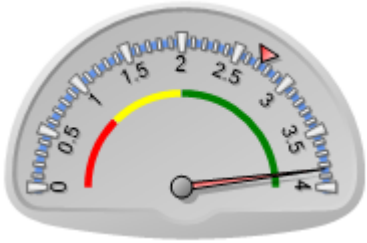


RECURSOS

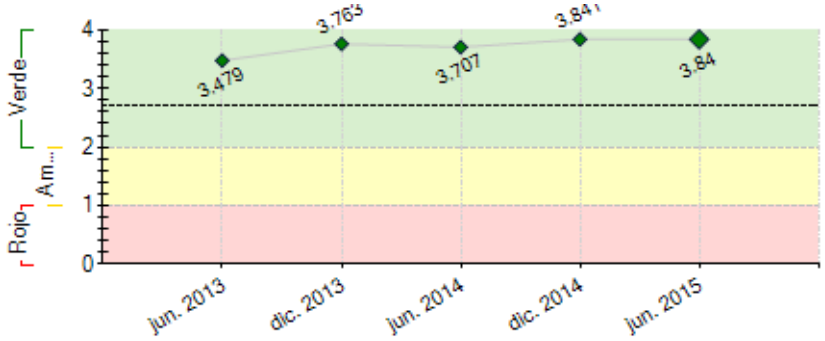




PUNTAJE DE DESEMPEÑO



Puntaje actual: Satisfactorio: 3.84
Promedio FOMIN: 2.726

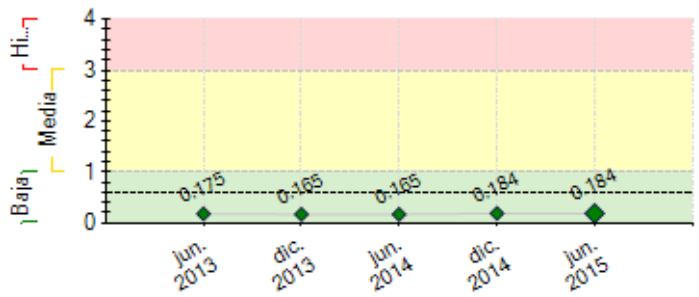


----- Promedio desempeño FOMIN

RIESGOS EXTERNOS

CAPACIDAD INSTITUCIONAL

	Riesgo
Administración Financiera:	
Adquisiciones:	
Capacidad Técnica:	



---- Promedio de riesgo FOMIN: 0.601

SECCIÓN 2: DESEMPEÑO

Resumen del desempeño del proyecto desde el inicio

The main results achieved are: (i) Over 300 community members trained in knowledge transfer sessions; (ii) 110 members of NGOs & local institutions participated in knowledge transfer sessions; (iii) Over 100 tour leaders & guides trained on projects; (iv) 5 B2B contracts signed with community organizations; (v) 95% customer satisfaction achieved at CBT enterprises; (vi) 1 policy proposal in Guatemala and 3 policy action plans in Peru developed by municipal staff in project sites. The project encountered difficulties in the following areas: (i) budgeting was inaccurate for Peru restaurant and project manager benefits and therefore counterpart funds increased by approximately $75,000; (ii) the policy planning and capacity building process in Peru proved difficult. In the end, 3 action plans were developed; however, consistent participation rates in information sessions meant all three municipalities required individual work sessions to develop plans. The risk level of the project is low as all projects are operating independently. The highest risk is the governments not adopting the policy and action plans presented. The prospects of the project in terms of achieving its objective are optimistic, as we have reached the major goals.

Comentarios del líder de Equipo de Supervisión

De acuerdo con los comentarios de la Agencia Ejecutora
Project execution has been very good, careful, both market oriented and community oriented to maintain the authenticity of the tourism experience and benefit the communities. The lessons learned have been important for development of this project and others in community based tourism, eco-tourism and destination management.

Resumen del desempeño del proyecto en los últimos seis meses

The main achievements of the semester were: (i) the completion of the policy planning component; (ii) monitoring all CBT enterprises and related enterprises to ensure self-sufficiency, and (iii) monitoring of successful launch of projects completed by Huchuy Qosco Association using restaurant profits (includes computer lab & library, administration building & healthcare). There was difficulty and some delay in achieving the Peru policy plans under component 4 due to a changeover in government and also a lack of participation due to lack of time available of municipal staff. It was solved through support of our counterpart NGO, CENFOPAR, and field manager Joel Callañaupa providing follow-up sessions with the municipal teams in each office of Urubamba, Calcay, and Yucay. Monitoring CBT enterprises continued through field visits and communications and project manager duties were transferred back to technical director with end of that contract. Field Manager in Peru continues to monitor Peru enterprises and socio-environmental interventions in Cuncani community focused on the development of home-based organic gardens and training of the 37 recipient families to ensure production continues once project is over, with goal to improve nutrition levels in community. Focus for final semester is on completion of knowledge products as well as communicating and transferring model through conferences in Colombia and Chile and workshops in Costa Rica and Nicaragua in September 2015.

Comentarios del líder de Equipo de Supervisión

De acuerdo con los comentarios de la Agencia Ejecutora

The project team was able to overcome obstacles to complete the activities in economic development action plans based on tourism, and has worked to establish ongoing actions in the communities that are expected to continue beyond the project period as accepted practices.

Dissemination activities in Costa Rica and Nicaragua will serve to transfer the lessons learned in tourism policy development and actions, along with tourism product design based on market demands.

SECCIÓN 3: INDICADORES E HITOS

Propósito: Create a model that will optimize market access and efficiency in the tourism value chain by connecting MSE with a large adventure tour operator from the point of product development, providing them access to a ready market, capabilities and the tools to serve the market demand.

	Indicadores	Línea de base	Intermedio 1	Intermedio 2	Intermedio 3	Planificado	Logrado	Estado
R.1	Number of MSE's connected to the tour operator supply chain and receiving a continual flow of visitors.	0 Nov. 2012	30 Jul. 2014			50 Nov. 2015	35 Jul. 2014	
R.2	Number of long term future sales contracts (B2B) between the community networks and the tour operator.	0 Nov. 2012	5 Jul. 2014			8 Nov. 2015	5 Jul. 2014	
R.3	Number of communities with an internal community fund mechanism from increased sales operating for covering communal expenses, maintenance and upgrading of tourism enterprises.	0 Nov. 2012	3 Jul. 2014			5 Nov. 2015	5 Nov. 2014	

Componente 1: Community Based Tourism MSEs linked to international tourism value chains. **Peso:** 41% **Clasificación:**	**C1.I1**	Number of community based tourism MSEs in economically disadvantaged areas on tour routes with improved business acumen via training to meet market demands of supply chain.	0 Nov. 2012	32 Jul. 2014			34 Nov. 2014	37 Jun. 2014	Finalizado
	C1.I2	Number of staff members of local NGO's that participated in the different knowledge transfer sessions.	0 Nov. 2012	12 Nov. 2014			25 Jun. 2015	110 May. 2015	Finalizado
	C1.I3	Number of community members that participated in the different knowledge transfer sessions.	0 Nov. 2012				300 Nov. 2014	306 Oct. 2014	Finalizado
	C1.I4	Number of tour leaders that participated in the different knowledge transfer sessions.	0 Nov. 2012				100 May. 2015	94 Jun. 2015	Finalizado
	C1.I5	Number of local guides, porters or cooks trained during the different knowledge transfer sessions.	0 Nov. 2012				100 Nov. 2014	106 Nov. 2014	Finalizado
	C1.I6	Number of tour leaders from tour operator providing quality control monitoring and feedback of CBT products and appropriately managing tours in community settings.	0 Nov. 2012				100 Nov. 2014	104 Nov. 2014	Finalizado
	C1.I7	Number of B2B signed contracts with community organizations that group together more than 35 MSEs.	0 Nov. 2012				5 Nov. 2014	5 Oct. 2014	Finalizado
Componente 2: Tourism related MSE development **Peso:** 12% **Clasificación:**	**C2.I1**	Number of tourism related MSE's that have improved their business acumen.	0 Nov. 2012				8 Jul. 2014	9 Jul. 2014	Finalizado
	C2.I2	Number of tourism related MSE's with 100%competency in basic accounting record keeping, inventory management.	0 Nov. 2012				16 Nov. 2014	22 Nov. 2014	Finalizado
	C2.I3	Average customer satisfaction score in tourism related MSE's participating in the project (B2B, B2C).	0 Nov. 2012				80 Nov. 2014	95 Dic. 2014	Finalizado
	C2.I4	Number of B2B contracts with other sustainable or travel related product or services businesses seeking to invest in local sustainable development.	0 Nov. 2012				16 Nov. 2014	21 Nov. 2014	Finalizado
Componente 3: Market Access **Peso:** 17% **Clasificación:**	**C3.I1**	Number of new CBT and tourism related products included in itineraries of G Adventures and other tour operators	0 Nov. 2012	5 May. 2014			10 Nov. 2015	6 Mar. 2014	En curso
	C3.I2	Number of positive customer and social media mentions of project CBT and tourism related products.	0 Nov. 2012	20 May. 2014			100 Nov. 2015	284 May. 2014	En curso
	C3.I3	Number of G Adventures catalog and newsletter mentions of project activities, beneficiaries and sites.	0 Nov. 2012	20 Jul. 2014			100 Nov. 2015	54 Ene. 2015	En curso
	C3.I4	Number of project project sites that show an increase in sales for participating tourism and tourism related MSE's working with other B2B buyers and prospects.	0 Nov. 2012				2 May. 2015	3 May. 2015	Finalizado
	C3.I5	Number of dedicated pages on Planeterra's website to project destinations.	0 Nov. 2012				5 Nov. 2015	5 May. 2013	Finalizado
Componente 4: Enhance Local Governance related to sustainable tourism **Peso:** 11% **Clasificación:**	**C4.I1**	Baseline policy analysis for target destinations in Guatemala and Peru.	0 Nov. 2012				2 Oct. 2013	2 Oct. 2013	Finalizado
	C4.I2	Green Economy/Sustainable Tourism Training module completed for Guatemala and Peru municipal government participants.					Jul. 2014	Si Abr. 2015	Finalizado
	C4.I3	Proposal in Peru (resulting from training activities) for local governments with policy instruments and actions to enhance stewardship of territorial resources and sustainable tourism needs prepared and presented for approval at the appropriate level.	0 Nov. 2012				1 Jun. 2015	1 Jun. 2015	Finalizado
	C4.I4	Proposal in Guatemala (resulting from training activities) for local governments with policy instruments and actions to enhance stewardship of territorial resources and sustainable tourism needs prepared and presented for approval at the appropriate level.	0 Nov. 2012				1 May. 2015	1 May. 2015	Finalizado
	C4.I5	Number of interventions taken up by local governments in Peru and Guatemala.	0 Nov. 2012				2 Nov. 2015		
	C4.I6	Knowledge product transferred to local development entities in Costa Rica and Nicaragua.	0				2 Nov. 2015		
Componente 5: Knowledge & Communication **Peso:** 19% **Clasificación:**	**C5.I1**	Monitoring and Evaluation Model for Socially Inclusive Tour Operations designed and baselines created for 5 project sites.	0				1 May. 2013	1 May. 2013	Finalizado
	C5.I2	Monitoring and Evaluation Model presented to MIF for their Knowledge Platform. (tested and completed full cycle)					Ene. 2016		
	C5.I3	Paper presented on the tour operators/ non-profit intervention to develop CBTproduct.	0 Nov. 2012				1 Nov. 2015		
	C5.I4	Self-directed learning CBT Success Factors module presented, including Lessons Learned from local partners, and working with indigenous peoples.	0 Nov. 2012				1 Nov. 2015		
	C5.I5	Self-directed learning module CBT for tour leaders presented.	0 Nov. 2012				1 May. 2015	1 Jun. 2015	Finalizado
	C5.I6	Product Support Team Model for CBT Implementation including Lessons Learned presented.	0 Nov. 2012				1 May. 2015	1 May. 2015	Finalizado
	C5.I7	Future sales model instrument presented.	0 Nov. 2012				1 May. 2015	1 May. 2015	Finalizado
	C5.I8	Informational video on project results developed and distributed widely according to communications plan.	0 Nov. 2012				1 Nov. 2015		

Hitos		Planificado	Fecha Vencimiento	Logrado	Fecha en que se logró	Estado
H1	Conditions Prior	2	May. 2013	2	Nov. 2012	Logrado
H2	M&E system	1	May. 2013	1	May. 2013	Logrado
H3	2 product support teams trained- GU and NI	2	May. 2013	2	May. 2013	Logrado
H4	2 Product development plans completed	2	Oct. 2013	2	Oct. 2013	Logrado
H5	2 baseline policy analyses completed for sustainable tourism-DEL training in GU and PE	2	Oct. 2013	2	Oct. 2013	Logrado
H6	Improvements completed in GU and NI and CR	1	Ene. 2014	1	Jul. 2013	Logrado
H7	PE product development plans completed	1	May. 2014	1	Dic. 2013	Logrado
H8	Improvements completed in 2 sites PE	1	May. 2014	1	Dic. 2013	Logrado
H9	Governance policy training tool for sustainable tourism prepared	1	Nov. 2014	1	Ago. 2014	Logrado
H10	Future sales contracts signed, small scale testing complete in GU, NI, CR, PE	1	Nov. 2014	1	Nov. 2014	Logrado
H12	Product support team model complete	1	May. 2015	1	May. 2015	Logrado
H11	[*] Future sales model complete	1	May. 2015	1	Nov. 2014	Logrado
H13	SDL model complete	1	Nov. 2015			

H14	Informational video complete	1	Nov. 2015			
H15	Socioeconomic effects measured in 5 sites	1	Ago. 2016			

[*] Indica que el hito ha sido reformulado

FACTORES CRÍTICOS QUE HAN AFECTADO EL DESEMPEÑO
[No se reportaron factores para este período]

SECCIÓN 4: RIESGOS

RIESGOS MÁS RELEVANTES QUE PUEDEN AFECTAR EL DESEMPEÑO FUTURO

	Nivel	Acción de mitigación	Responsable
1. Donor and academics continue to support supply side funding of MSE model without a view to marketability of the final products.	Baja	Disseminate project lessons learned in different forums geared towards donors and academia.	Project Guest
2. Other tour operators do not show interest in inserting community based tourism into their value chain, and developing the product.	Baja	Communicate project achievements in different industry events.	Project Guest
3. Tourism Industry forums interest wanes for socially inclusive economic development topics.	Baja	Monitor the agenda and topics of the different Tourism Industry forums.	Project Guest
4. Municipalities in tourism destinations don't show interest in strengthening public-private models and relations for the green economy in tourism.	Baja	Identify leaders within each local government interested in strengthening public-private models and relations.	Project Guest
5. Political instability creates a negative perception of the destinations for tourists.	Baja	Monitor the political situation in the different countries. Since the intervention has beneficiaries in 4 different countries, including multi-country tours, it is expected that diversification will minimize any potential impact on tourism flows.	Project Guest

NIVEL DE RIESGO DEL PROYECTO: Baja **NÚMERO TOTAL DE RIESGOS:** 8 **RIESGOS VIGENTES:** 5 **RIESGOS NO VIGENTES:** 0 **RIESGOS MITIGADOS:** 3

SECCIÓN 5: SOSTENIBILIDAD

Probabilidad de que exista sostenibilidad después de terminado el proyecto: P - Probable

FACTORES CRÍTICOS QUE PUEDEN AFECTAR LA SOSTENIBILIDAD DEL PROYECTO

[No se reportaron factores para este período]

Acciones realizadas o a ser implementadas relativas a la sostenibilidad:

Actions taken in this reporting include:

Developing and executing an enhanced online training module which to date has been completed by 27 tour leaders in Central America, 44 tour leaders in Peru and 41 Inca and Lares trek guides in Peru. This training is ongoing, but the goal was to ensure all G Adventures guides who visit our projects have a full understanding of the projects, the background on how we do our work, and to have written documentation including personal stories to assist with communications to the travellers about each one.

Continued monitoring of CBT and related enterprises continued in all sites. The goal is to ensure each one is operating self-sufficiently. Specifically in Peru, our field manager also monitored the design, budgeting and execution of the community projects developed by the Huchuy Qosco association to ensure they are able to manage the restaurant profits into the future.

Policy plans in Peru were developed through in-person work sessions with each municipality in the Sacred Valley and our counterpart, CENFOPAR, will undertake a monitoring role to measure implementation going forward. They do cite risk due to ever-changing staff.

SECCIÓN 6: LECCIONES PRÁCTICAS

	Relativo a	Autor
1. In regards to the development of policies and action plans, it seems that the methodology used in San Juan La Laguna, Guatemala which was over a three month period using a meeting/workshop format was much more effective than that used in Urubamba, Peru which was based on the original course instruction method designed by consultants. In San Juan they planned each subsequent meeting at a current meeting based on availability of stakeholders and in the time in between meetings promoted participation and thereby increased participation. In Peru it was set up as a weekly course and therefore not all municipal staff could consistently attend, and participation was not as high. This was the method recommended by counterpart and in the end the individualized work sessions with each municipal team produced action plans that were approved by municipal department heads therefore we should hopefully see implementation.	Implementación	Galaski, Kelly